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TRAVEL PRINTOUT

Supported by a grant from Travel Industry Association of America

U.S. Travel Data Center

Research News for the U.S. Travel Industry

May 1986 Volume 15, Number 5

Data Center Forecasts Increase in Summer Vacation Travel

U.S. summer vacation travel will increase 5 percent over last year's levels, the US Travel Data Center projected today.

Summer vacation trips will reach the highest level on record, according to the non-profit research center's report, 1986 Outlook for Summer Travel: Guide to Vacation Markets.

The summer forecast is based upon interviews with more than 4,000 American adults gathered by the Data Center's monthly National Travel Survey, now in its eighth year.

The Data Center predicts vacationers will take 288 million person-trips and spend almost 1.8 billion nights away from home in June, July and August 1986. (A person-trip is counted each time one person travels 100 miles or more away from home.)

1986 Projected Summer Vacation Person-Trips: Region of Residence (Millions)

Cities have become the most popular type of destination among summer vacation planners this year, displacing last year's favorite, ocean beaches, which have fallen to a close second. About one-third of vacationers are budgeting more for travel this year than last.

The Data Center projects 82 percent of summer vacationers will travel by car, truck or recreational vehicle, while 15 percent will go by air.

Among the regions, the 12 states of the Southeast will generate the most summer vacation travelers. Residents of this and the Great Lakes regions will increase their summer travel by 8 percent this year, more than any other region. The Southeast will again draw the most summer visitors.

1986 Projected Summer Vacation Person-Trips: Region of Destination (Millions)

Foreign destinations will attract 8.3 million American visitors this summer. While travel to Canada and Mexico will increase 10 percent over last summer, trips to overseas destinations will fall 20 percent to 2.3 million vacationers. Travel to the Caribbean/Bermuda and Pacific/Asia areas is expected to rise 3 percent.

"All signs point to record domestic Tourism levels this summer," commented Dr. Douglas C. Frechtling, director of the US Travel Data Center. "Seldom have economic, social and political factors combined to provide such a boost to U.S. vacation travel as they have this summer."

The complete forecast, 1986 Outlook for Summer Travel: A Guide to Vacation Markets, is being sent to full members of the Data Center and is available to limited members and others for $60.00 prepaid from the US Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036.##

Travel Price Index

Travel Prices Plunge in March

Plummeting gasoline prices contributed to the fourth decline in travel costs in five months. Travel prices fell 1.9 percent in March, the largest drop in at least 18 years, according to the US Travel Data Center's Travel Price Index (TPI).

For comparison, consumer goods costs, as measured by the Consumer Price Index (CPI), declined 0.5 percent in March.

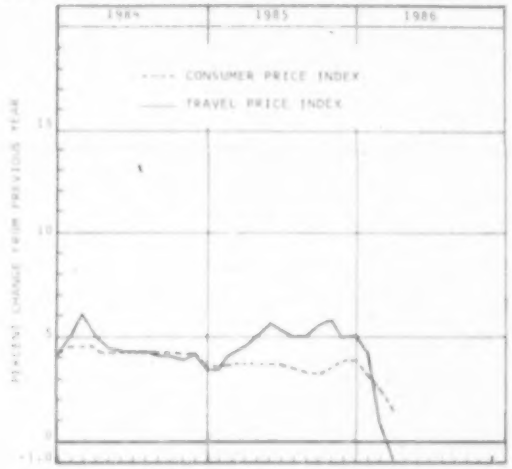
The TPI, which measures changes in the seasonally unadjusted prices of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in the United States, dropped to 376.2 (1967=100) in March, its lowest level since March 1985.

Gasoline prices fell 12.3 percent in March, this category's largest monthly decline since the TPI began in 1969.

Increases in intercity bus fares led all TPI components, jumping 1.1 percent in March.

Despite the steady decline in travel prices, March's TPI was 1.1 percent higher than 12 months earlier, while the CPI increased 2.3 percent.

Gasoline prices comprised the only TPI component to drop during the past 12 months, down 14.5 percent, while intercity bus fares gained 12.2 percent, more than any other TPI component.##



Travel Price Index Reacts to Falling Gasoline Prices

Monthly and Annual Rates of Change in the Travel Price Index and Components
March 1986

TPI Component	Monthly Percent Change February 1986 to March 1986	Annual Percent Change March 1985 to March 1986
Transportation	- 5.2	- 3.6
Airline Fares	- 0.7	3.7
Intercity Bus Fares	1.1	12.2
Intercity Train Fares	0.0	3.9
Taxicab Fares	0.2	2.9
Gasoline	-12.3	-14.5
Lodging	0.5	4.5
Food Away From Home	0.4	3.8
Entertainment Services	0.0	7.6
Incidentals	0.5	1.6
TRAVEL PRICE INDEX	- 1.9	1.1
CONSUMER PRICE INDEX	- 0.5	2.3

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for $58 per year, U.S., Canada and Mexico; other foreign countries, $65 per year, payable in U.S. funds only.

Travel Spending Reaches $269 Billion in 1985

U.S. residents and foreign visitors spent $269 billion on travel in America and its territories during 1985, according to preliminary estimates in the US Travel Data Center's travel industry guide, TravelTab 1986.

The pocket reference reports spending by travelers away from home in the United States increased 7 percent from 1984 levels.

American travelers spent $258 billion and foreign visitors spent $12 billion in the United States during 1985.

Travel expenditures abroad by Americans rose to $17 billion, a 7 percent increase from 1984.

Spending on travel directly generated $60 billion in wage and salary income for 6 million U.S. workers and enriched federal, state and local treasuries by $33 billion.

U.S. residents took 1,078 million person-trips in 1985. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

TravelTab 1986, a six-panel quick-reference guide to U.S. and international travel volume and expenditures, is being sent to all Data Center members and is available for $4 prepaid from the US Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036.

The guide also may be purchased in bulk quantities of 200 or more for 25 cents each plus $50.##

Committee Recommends Forum Program Topics

Regional trends, family vacations and industry sectors head the Travel Outlook Forum Advisory Committee's recommendations of topics for the 12th annual conference in Miami Beach, Fla., Oct. 10, 1986.

Other topics suggested at the committee's meeting in New York City, Feb. 28, include 1986 travel trends, the 1987 economic outlook and the impact of changes in the population on the travel industry.

The committee also recommended covering both market segments and industry sectors, including the retired traveler, international and business travelers, lodging and transportation.

Committee members include Pat Duricka, International Association of Amusement Parks and Attractions; Diana M. Orban, Diana Orban Associates; Lou Benincasa, American Express Publishing Co.; Alan Fredericks, Travel Weekly; James Hepple, representing the forum's co-sponsor, Travel and Tourism Research Association; Max L. Madsen, Better Homes and Gardens; and Hershel Sarbin, Hershel Sarbin Associates.

The 1986 Travel Outlook Forum will be held in conjunction with Travel Industry Association's National Conference and Showcase.##

1985 Air Travel Survey Released

A record number of Americans flew on commercial airlines last year, according to the Air Transport Association (ATA).

About 48 million adults (28 percent of the total U.S. adult population) flew during 1985, breaking the 1984 record of 46 million (27 percent).

Other findings from the survey conducted for ATA by the Gallup Organization include:

- Seventy percent of adults (120 million) have flown in their lifetime, 72 percent of all American men and 68 percent of all American women.
- Fifty percent of all trips within the last 12 months were for pleasure/personal reasons and 50 percent were for business travel.
- Fliers averaged 3.2 round-trips each in 1985.

Survey results came from interviews with 4,581 adults 18 years of age and older.

The 1985 Air Travel Survey is available for $35. Contact Public Information Office, Air Transport Association, 1709 New York Ave., NW, Washington, DC 20006.##

Changes in Standard Industrial Classification System Would Benefit Travel Industry

The Standard Industrial Classification (SIC) system should recognize distinct industries in the economy, according to US Travel Data Center Director Douglas C. Frechtling.

"The travel and tourism industry, although not explicitly recognized in the primary-activity structure of the SIC, can be synthesized if establishments engaged to a substantial degree in providing goods and services to those traveling away from home are distinguished from those that are not so engaged," he said.

Dr. Frechtling was responding to a Feb. 14, 1986, Federal Register notice by the Office of Management and Budget soliciting public comments on the Technical Committee on Industrial Classification recommendations to revise the 1972 SIC Manual and its 1977 Supplement.

In 1984, Dr. Frechtling recommended to the committee that establishments primarily providing passenger transportation and related services should be distinguished from those primarily providing commodity transporation and warehousing.

He said establishments primarily providing intercity passenger transportation and related services should be distinguished from those primarily providing local transportation.

Further recommendations by Dr. Frechtling included:

- Industry 7512 should be split between passenger rental without drivers and passenger car leasing.

The Census Bureau distinguished between these Industry 7512 segements in several state reports from the 1982 Census of Service Industries, indicating the split is feasible.

The Bureau found 3,286 establishments renting passenger cars without drivers. These firms had business receipts of nearly $3.5 billion and about 40,000 employees.

- Major Group 44 should include a new group for water passenger transportation. This group could be further divided into deep-sea transportation such as cruise lines, river and canal transportation and passenger transportation unclassified elsewhere.
- A new industry entitled, "Local Sightseeing and Recreational Transportation," should be established in Group 799.

The industry should include sightseeing buses from Industry 4119, sightseeing, excursion, and air boats from Industry 4459, for-hire horse-drawn cabs and carriages from Industry 4789, and aerial trams, cable lifts, houseboat rentals, motorcycle rentals, bicycle rentals, rowboat and canoe rentals, scenic railroads, pack trains, ski lifts, and tourist guides from Industry 7999.

- There are businesses that should be explicitly listed under SIC codes.

Hotel reservation services should be under Industry 4729 and the name changed to "travel arrangement."

Convention centers should be under Industry 7399, "Business Servies Not Elsewhere Classified."

Convention and Visitor bureaus should be under Industry 8611, "Business Associations."

Aircraft caterers should be under Industry 5812, "Eating Places," as other caterers and industrial food service establishements are.

- Combining Industries 4141 (local passenger charter service) and 4142 (charter service, except local) should not be done since it reduces information on the growing intercity bus charter business.##

Editor's note: Last month's issue of Travel Printout summarized the findings of Alan E. Pisarski's inventory of travel survey data available from federal government sources. The article failed to mention that the project was initiated and funded by the U.S. Travel and Tourism Administration.

Additional copies of the April 1986 issue can be obtained by sending $5 for each copy to the US Travel Data Center, 1899 L Street, NW, Washington, DC 20036. ##

National Travel Survey

Travel Posts Increase in January

January travel increased nearly 5 percent from year-earlier levels, according to the US Travel Data Center's latest National Travel Survey results.

Travel by Americans rose from 61 million person-trips in January 1985 to 64 million a year later. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey of more than 1,500 American adults reported that vacation travel decreased 7 percent, while weekend travel increased slightly.

Pleasure travel (visiting friends and relatives, outdoor recreation, sightseeing and entertainment) soared 13 percent, offsetting a 1 percent decline in business/convention travel.

Average trip duration rose to 5.2 nights from 4.1 nights one year earlier. Round-trip distance went up from 980 miles in 1985 to 1,130 miles in 1986.

Travel by personal motor vehicle decreased 13 percent from January 1985, and air travel showed a significant drop.

The South Atlantic/East South Central Census region was the most popular with American travelers. The largest increase in travelers came from the West North Central/West South Central region.

Results from the National Travel Survey are projectable to the total U.S. adult population.##

Data Center Offers Free Program Guide

A free 1986 Guide to Membership, Publications and Programs is available from the US Travel Data Center.

The 29-page guide details the Data Center's 1986 research program and describes past and current publications and membership benefits.

Reports listed in the guide for 1986 publication include the 1986 Outlook for Travel and Tourism, and TravelTab 1986 (a quick reference guide to current travel trends) and quarterly and annual reports from the 1986 National Travel Survey.

For a free 1986 guide, write to the US Travel Data Center, 1899 L Street, NW, Washington, DC 20036 or call (202) 293-1040.##

Visitor Volume at National Parks

Region	FEB 1986 visits*	Change from FEB 1985 (percent)	Percent change 1986/1985 Year-to-Date
NEW ENGLAND	250,165	-6.3	1.4
MIDDLE ATLANTIC	663,683	-14.5	3.2
SOUTH EAST	4,352,844	0.1	7.7
EAST NORTH CENTRAL	225,511	8.6	13.1
WEST NORTH CENTRAL	138,053	8.4	12.2
WEST SOUTH CENTRAL	449,377	23.3	31.8
MOUNTAIN	1,222,378	0.6	11.3
PACIFIC	2,450,576	-1.8	4.7
TOTAL	9,752,587	-.4	7.9

* adjusted for differences in reporting units

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

Current Travel Indicators

CURRENT TRAVEL INDICATORS

	Current Month	Current Value	Percent Change From Previous Month	Percent Change From Year-ago Month	Percent Change Year-to-date 1985/84
Establishment receipts or retail sales					
Hotels, motels and other lodging places(1)	Feb	$ 3,323 million	2.7	6.0	6.1
Eating and drinking places(2)	Feb	$11,373 million	0.9	7.1	7.2
Gasoline service stations(2)	Feb	$ 8,317 million	- 1.2	2.6	1.7
Commercial lodging demand					
Hotel/motel occupancy rate(3)	Feb	62.5 percent	1.3	- 3.4	- 0.7
Real demand for commercial lodging(4)	Feb	$ 50.0 million	14.9	1.5	2.0
Airline passenger traffic(5)					
Domestic revenue passenger-miles	Feb	17.5 billion	- 4.0	12.0	10.8
International revenue passenger-miles	Feb	3.5 billion	-22.4	3.6	7.6
Highway traffic volume(6)					
Rural arterial vehicle-miles	Feb	29.3 billion	- 7.4	4.7	6.6
Rail passenger traffic(7)					
Amtrak passenger-miles	Feb	312.5 million	-10.6	6.5	7.8
Travel Price Index(8)	Feb	383.3	- 0.7	4.2	4.6
U.S. resident travel(9)					
Total person-trips	Jan	63.8 million	-22.5	4.6	4.6
Vacation person-trips	Jan	38.4 million	- 6.6	- 6.6	- 6.6
Total person-nights	Jan	331.8 million	-28.1	13.3	13.3
Vacation person-nights	Jan	249.6 million	-34.9	4.7	4.7
Public use of national parks(10)					
Visits	Feb	10,078,049	-11.6	- 0.4	14.6
Overnight stays	Feb	676,586	60.5	4.7	3.5
Foreign arrivals in U.S.(11)					
From overseas	Nov	586,537	-13.2	- 6.3	--1.0
From Canada	Feb	579,728	-19.6	- 4.0	0.3
U.S. citizen departures(11)					
To overseas	Nov	939,881	- 9.6	- 1.1	6.1
To Canada	Feb	413,055	12.9	14.5	16.4
Domestic demand for motor gasoline(12)					
Barrels per day	Feb	6,438 thousand	- 0.8	- 1.3	0.5

N/A = not available

(1)Source: Smith Travel Research, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Smith Travel Research, seasonally adjusted. (4)Source: Smith Travel Research, unadjusted room nights sold. (5)Preliminary; U.S. scheduled service air carriers. Source: U.S. Department of Transportation. (6)Source: Federal Highway Administration. (7)Source: National Railroad Passenger Corporation (Amtrack). (8)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9)Source: U.S. Travel Data Center. (10)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (11)Source: Statistics Canada and Nettleton Travel Research Center. (12)Preliminary; Source: U.S. Department of Energy.

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PERMIT NO. 8523
WASHINGTON, D.C.

May 1986

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